

Session 2: Module 5 - Out-of-State Transfers	
SCRIPT	
Description	Text
1. Introduction	Welcome to Session 2 Module 3 of the M-SPIRIT Required Online Training presented by the Montana Department of Public Health and Human Services WIC Program.
2. Start	Participant Search and List – Part 3
3. <voc>	In this module, we are going to talk about out-of-state and in-state transfers that can be performed from the Applicant Prescreening window and the Participant Search/List screen respectively.
4. VOC	In M-SPIRIT, out-of-state transfers are called VOC Certifications.
	VOC Certifications are completed via Applicant Prescreening for participants who are brand new to the Montana WIC Program.
	As with any new applicant, you should always verify they have never been on Montana WIC before or been prescreened by searching the Statewide database for the participant by their birthday.
5. VOC1	If the participant is already in the Montana WIC database, the VOC or out-of-state transfer must be performed via the Participant Folder and NOT in Applicant Prescreening because if they already exist in the Montana WIC database, you do not want to create a new record for the participant.
	In order to perform a VOC certification, the participant must have a Verification of Certification (or VOC) document from a state other than Montana and be in a current and valid certification.
6. <voc1>	If the participant is brand new to Montana WIC and doesn't have any other household members who have current records in Montana WIC, you can perform a VOC cert and create a new household at the same time.
	Ducky Quackers is a child whose family moved to Montana from North Dakota. He's never lived in Montana before.
	His mom has his VOC that indicates his certification ends on 6/30/11.
	Click the Create New Household icon.
7. <voc2>	Type Quackers into the Last name field and press the Tab key on your keyboard.
8. <voc3>	Type Ducky into the First name field and press tab.

Session 2: Module 5 - Out-of-State Transfers	
SCRIPT	
Description	Text
9. <voc4>	Press tab again.
10. <voc5>	Type 5/8/09 into the Birth Date field tab into the Address field.
11. <voc6>	Type 123 Lake Lane into the Address field and press the Tab key on your keyboard.
12. <voc7>	Since the WIC Category was auto-selected by M-SPIRIT based on the Birth Date, press your Tab key again.
13. <voc8>	The city defaults to Ballatine and the Quackers live in Billings.
	When there are multiple options in a list that begin with the same letter, you simply have to type the letter again to go to the next option.
	Press "b" on your keyboard.
14. <voc9>	Since there are multiple zip codes for Billings you must select the appropriate zip code.
15. <voc10>	Select 59104
16. <voc11>	Click OK.
17. <voc12>	Go ahead and use your mouse to click on the gender drop down.
18. <voc13>	Click Male
19. <voc14>	Press the Tab key.
20. <voc15>	Since Billings is in Yellowstone County, press tab again.
21. <voc16>	The Same as Residence button is the next "field" in the tabbing order, which you can tell because its edges are highlighted with a dashed line.
	When buttons are highlighted, pressing the Enter key on your keyboard is just like clicking on them.
	Press the Enter key on your keyboard to auto-fill the Mail address fields with the residential information.
22. <voc17>	The Applicant Has VOC Document checkbox allows you to indicate that this is an out-of-state transfer.
	Click the checkbox.

Session 2: Module 5 - Out-of-State Transfers	
SCRIPT	
Description	Text
23. <voc18>	Notice that by selecting the Applicant Has VOC Document the Certification End Date field is now enabled.
	Remember, Ducky Quackers' VOC indicated that his cert ended on 6/30/11.
	The VOC Certification in M-SPIRIT requires the Cert END Date.
	Enter 6/30/11 and press the Tab key.
24. <voc19>	Since the Quackers live in Montana we know the area code is correct, so enter 123-9876 and pres the tab key.
25. <voc20>	Type Cell into the Comment field and click on the How Heard about WIC field.
26. <voc21>	Ducky's mom first heard about WIC from a TV Ad. Select TV Ad from the drop-down list.
27. <voc22>	We want to return to the participant list when we are done with Ducky's prescreen.
	M-SPIRIT defaults to Return to Participant List on completion, so go ahead and click OK.
28. <voc23>	Go ahead and do what we need to do to view Ducky Quackers' Cert Dates in the Participant Search/List screen.
29. <voc24>	Notice that Ducky's Cert Effective (or Start) date is today's date (3/30/11) since his certification in the Montana WIC program began today.
30. VOC2	M-SPIRIT is only able to validate the Certification End Date for children since their cert end date must within 6 months of today's date, unless turning 5 years old, then their Cert End Date is their 5th birthday.
	For infants and women, M-SPIRIT cannot validate the Cert End Date because the necessary information isn't collected in prescreen.
31. VOC3	Certification End Dates for infants are always 1 year from their date of birth if certified before 6 months old and for 6 months if certified after 6 months old.
	For Pregnant women, their Cert End Date is 6 weeks + their Expected Delivery Date.
	For Breastfeeding women, it's their Delivery Date + 1 year or until they are no longer breastfeeding, whichever comes first.

Session 2: Module 5 - Out-of-State Transfers	
SCRIPT	
Description	Text
	Lastly, for Non-Breastfeeding women, their Cert End Date is their Delivery Date + 6 months.
	In most cases, the system auto-calculates the cert end date. The VOC Certification is the exception.
32. <voc25>	Let's add an infant and breastfeeding mom to the Quackers household.
	Go ahead and click on the Create New Member icon since Ducky is already highlighted in the Participant List.
33. <voc26>	We are going to quickly fill in the required fields using keyboard shortcuts.
34. <voc27>	<no script>
35. <voc28>	<no script>
36. <voc29>	<no script>
37. <voc30>	<no script>
38. <voc31>	<no script>
39. <voc32>	<no script>
40. <voc33>	Done. Your turn. Mallory Quackers was also certified in North Dakota. Her VOC document indicates her cert ends on 1/31/12.
	Go ahead and indicate that this is a VOC Certification.
41. <voc34>	Enter Mallory's Cert End Date and then click the Add Another Household Member radio button.
42. <voc35>	Click the OK button.
43. <voc36>	Again, for expediency, we are going to complete the required fields for Mama Quackers.
44. <voc37>	<no script>
45. <voc38>	<no script>
46. <voc39>	<no script>
47. <voc40>	<no script>
48. <voc41>	<no script>
49. <voc42>	According to Mama Quackers' VOC document, she was certified as Breastfeeding and her cert ends on 1/31/12.
	Indicate this is a VOC certification.
50. <voc43>	Enter Mama Quackers' Cert End Date and click OK.

Session 2: Module 5 - Out-of-State Transfers	
SCRIPT	
Description	Text
51. <voc44>	Since Mama Quackers is Breastfeeding, more information is needed to complete the VOC.
	Click in the Actual Delivery Date Box.
52. <voc45>	Enter Mallory's birth date, which is 1/4/11.
53. <voc46>	At this point, you probably had enough discussion with mom to have a general idea of how much she is breastfeeding.
	If not, make the most appropriate selection based on what you already know and you can change this later in the Participant Folder if you need to.
	Select Partially Breastfeeding less than or equal to max.
54. <voc47>	Click OK.
55. <voc50>	<no script>
56. VOC4	M-SPIRIT will automatically assign risk factor 502 (Transfer of Certification) and an appropriate priority based on that risk factor. The VOC certification must be completed in the Participant Folder.
	Session 6, which reviews VOC certs for participants who already have a Montana WIC record, will detail how to complete the VOC in the participant folder.
57. Questions	Do you have any questions about what we just reviewed? If so, please submit them via the M-SPIRIT Questions form on the Montana WIC website.
	All questions will be answered at a review session and in the Montana WIC web site Q & A section.

Session 2: Module 5 - Out-of-State Transfers	
SCRIPT	
Description	Text

Session 2: Module 5 - Out-of-State Transfers	
SCRIPT	
Description	Text